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CHINESE OUTBOUND TOURISM: NEW CHALLENGES FOR EUROPEAN TOURISM

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ABSTRACT

The growth of China's outbound tourism is a source of both threats and opportunities for European countries. Therefore, European tourism institutions and companies should focus their attention on this emerging market. The objective of this paper is to analyze the consequences that the boom in Chinese tourism could have for European tourism. A critical analysis provides the basis for actions and measures that the main European tourism institutions and companies should adopt in order to face these new challenges.

KEYWORDS

Chinese outbound tourism; Europe; Challenges

ECONLIT KEYS

L830; M100; O530.

1. INTRODUCTION: EUROPE IN THE CURRENT TOURISM CONTEXT

Europe is the region of the World which receives the most tourists and which earns the most tourism-generated income, followed by the Asia-Pacific region (World Tourism Organization [UNWTO], 2011). Europe received 50.7% of international tourists in 2010, far ahead of the Asia-Pacific region, which received 21.7%, and the Americas with 15.9%, the Middle East with 6.4% and Africa with 5.2%. However, in 2010 the economy of Europe grew much more slowly, with a growth rate of 3%, than many emerging economies. The so-called BRIC countries, Brazil, Russia, India and China were the real development power that drove the growth of international tourism (Zhang, Song and Deqian, 2011; UNWTO, 2012).

Forecasts for the coming years indicate that, although Europe will maintain the highest share of world arrivals, this share will decline to 46% in 2020. However, positive results are predicted, above all for the Asia-Pacific region. In the past few years, despite the influence of the global financial crisis, China's tourism industry has maintained an upward trend, and this has been an outstanding performance compared with the tourism industries of Western countries (Zhang, 2011a). Indeed, the UNWTO (2004) predicted that, by 2020, the number of Chinese outbound tourists will rise to 100 million.¹ Nevertheless, in view of recent trends, it is on course to reach that target well before 2020 (UNWTO, 2008).

Therefore, China will emerge as the fourth largest outbound tourism market, which will generate an income of € 250 billion, representing between 8% and 11% of GDP. Over the next years, China will be transformed from being a large country in tourism to being a powerful country in tourism (Lew, Yu, Ap and Guangrui, 2003). Because of the good performance of Chinese tourism, high expectations of the Chinese market have developed. There are obvious signs that more and more countries consider China to be a market they should target in the future (Zhang, 2011b).

On the other hand, although regional tourism will continue to constitute the lion's share of Chinese outbound tourism, Europe has become one of the most popular long-haul destinations for Chinese tourists in recent years (Xie and Li, 2009). Thus, Europe should not ignore the new tourism context, and should adopt measures to

improve competitiveness. China can offer enormous opportunities for those European countries that learn how to identify and exploit them.

The objective of this paper is to highlight some of the main opportunities inherent in China's emergence onto the global tourism scene for the European countries that are the main tourist destinations. In order to do this, we describe the most important characteristics of Chinese outbound tourism. This description will be the starting point for a critical analysis of Chinese tourism in Europe. Finally, we propose several actions and measures that tourism institutions and companies should adopt in order to face these new challenges.

2. THE CHINESE OUTBOUND TOURISM MARKET

2.1) CHINESE OUTBOUND TOURISM: SOME DESCRIPTIVE DATA

In stark contrast with the situation in Europe, which is one of the most consolidated tourism markets, the tourism industry in China is very young (Zhang, Pine and Zhang, 2000). Although tourism was included for the first time in the national plan for economic and social development in 1986 (in the Seventh Five-Year Plan: 1986-1990), it was not until the end of the 1990s that tourism in China experienced rapid growth (Wang and Qu, 2004). This could be due to the growth of per capita income of Chinese citizens together with an increase in leisure time and the structural adjustments of the national economy (Wu, Zhu and Xu, 2000).

More specifically, the rapid growth in tourism began after 1997, when the Chinese government decided to implement a range of measures to facilitate tourism. The second phase of the development of the Chinese outbound tourism market began that year. Overseas trips for leisure purposes were officially authorised and Approved Destination Status (ADS) agreements were signed with Australia and New Zealand. This system is based on bilateral agreements between China and selected overseas destinations. The ADS system restricts the overseas destinations to which Chinese nationals can travel, and restricts which foreign tour companies may operate in the Chinese market. This can be considered to be the real birth of international tourism from China (Keating and Kriz, 2008). After this, overseas tourism began to grow, and the forecasts of growth rates were tripled.

Regarding international tourism expenditure, China occupied third place in 2010, with a growth of 25.6%, overtaking the United Kingdom. China has shown by far the fastest growth in the last decade, quadrupling expenditure since 2000 (UNWTO, 2011). As Table 1 reports, a total of 57.3 million Chinese tourists travelled beyond the country's borders in 2010 (20.4% more than in 2009) (China Tourism Academy [CTA], 2011).

International regions	Number of Chinese tourists (millions)	Growth
Asia-Pacific	51.63	19.22%
Europe	2.34	14.69%
America	1.49	28.74%
Oceania	1.10	66.37%
Africa	0.74	90.92%
Total	57.3	20.42%

Table 1: Principal Chinese foreign outbound tourism destinations 2010
Source: CTA (2011)

After Hong Kong and Macao, the favourite destinations for Chinese tourists were Japan, Korea, Taiwan, Vietnam, the USA, Thailand, Singapore and Russia (CTA, 2011). Thus, most Chinese tourists who travel abroad prefer destination countries that are geographically and culturally close to home, and most of those are in Asia. However, in recent years, there has been a growing trend towards travel to countries situated at a greater geographical distance; i.e. long-haul destinations, defined as those that require more than six hours of flying time (Lui, Kuo, Fung, Jap and Hsu, 2011). As stated above, Europe is becoming one of the most popular long-haul destinations for Chinese tourists. Furthermore, it is the continent with the highest number of ADS countries. In 2010, 2.34 million Chinese tourists visited Europe, the most popular destinations being Russia, France and Germany (Table 2).

European country	Chinese tourists
1. Russia	710.900
2. France	567.294
3. Germany	510.611
4. Switzerland	286.420
5. Austria	182.282
6. Italy	148.000
7. Netherlands	126.000
8. United Kingdom	108.037
9. Spain	102.000
10. Belgium	79.908

Table 2: Top ten European destinations for Chinese outbound tourists 2010
Source: Tomás (2011)

2.2) PROFILE OF THE CHINESE TOURIST

The profile of Chinese tourists who travel abroad may help us to understand their selection of destinations and the characteristics of the trips that they choose.

According to the CTA (2011), long-distance Chinese tourists are people with high purchasing power who belong to the middle class or upper middle class. They are between 25 and 44 years old, 52.98% of them are men and 81% have completed higher education. Chinese tourists usually travel for leisure purposes. However, outbound tourism for leisure is a recent phenomenon in China. Official government trips, and business trips are still very important, providing the second and third most common reasons for travel (Paños, 2009).

Leisure trips usually have a duration of approximately 10 to 15 days, while business trips last for less than a week. Chinese tourists who travel for pleasure are usually urban tourists who prefer to visit cities and who enjoy art, food or sports more than spending time sunbathing on the beach. They usually travel by air, taking an organised trip and staying in 3 star hotels (business tourists stay in 4 or 5 star hotels). They prefer to spend as little as possible on travelling and accommodation and save their money for shopping, which is one of their favourite activities when they travel. They like to be offered features in their hotels that they are familiar with,

and these include typical Chinese food, a kettle or hot water point for drinking and for preparing Chinese tea and noodles, as well as a Chinese TV channel. They also expect a bathrobe, slippers and a safe in the room. They usually visit several countries in one trip. This is why they are attracted to Europe as the countries are close together and they can visit an average of five different countries during their trip (De la Morena, 2008).

Shopping, particularly for luxury articles and brand names, is a very important motivation for Chinese tourists. This is because luxury products in mainland China are more expensive than in Hong Kong or Europe and shops selling this type of article are still scarce in China. Moreover, 27% of the Chinese population between 30 and 44 years old consider foreign travel as a sign of social status. They are attracted by fashion and brands and the original or typical products of each country. Furthermore, it is customary for Chinese tourists to purchase gifts for their family and friends.

Most Chinese tourists still travel in organised groups for a number of reasons, which include the cultural distance and linguistic barriers, the fact that it is easier to obtain a visa and the preferences of those who have no previous experience in travelling abroad, especially to remote places such as Europe and Oceania, and who find group travel more supportive. Nevertheless, it is anticipated that individual trips will increase in the next few years, particularly among experienced travellers. Chinese tourists who travel individually usually have more purchasing power, speak several languages and have previous experience of travelling abroad. However, it is more difficult for lone travellers to obtain visas because this type of tourism is not covered by the ADS agreements or regulated by any policy and whether visas are granted or not depends on each embassy or consulate. Travelling outside of China often depends on visas, and one of the barriers to travel to the West is the slowness in processing them. In addition, some visas are denied in order to prevent illegal immigration. The logistical obstacles and problems in obtaining visas when travelling to the West have persuaded the majority of Chinese to travel to other Asian destinations (Tomás, 2011).

Overall, Chinese tourists are highly sensitive to safety aspects at their destination. Moreover, they follow a cycle of reverse seasonality, as they travel outside the usual western holiday periods, during the Spring Festival (January – February), which

marks the beginning of the Chinese year, the Labour Day Holiday (in May) and the National Day of the People's Republic of China (1 October)² (Keating and Kriz, 2008).

Another interesting characteristic is that the level of spending of Chinese tourists is higher than the average. Specifically, it is estimated that an Asian tourist spends up to double the amount of a European tourist. Finally, the number of Chinese people with a level of income that enables them to travel abroad is estimated at around 200 to 250 million (between 15% and 20% of the total population of China) (Paños, 2009).

3. CHINESE OUTBOUND TOURISM: A CRITICAL ANALYSIS FOR EUROPE

As we have mentioned above, the increase in Chinese outbound tourism can be extremely beneficial for Europe, if Europe can take full advantage of it.

One of the main opportunities for Europe presented by Chinese outbound tourism is the possibility of obtaining a significant market share of Chinese tourists who decide to travel overseas. So far, only a few Chinese tourists have decided to travel to Europe. As remarked above, only 2.34 million Chinese tourists chose Europe as a destination in 2010.

One of the factors that determine the choice of destination is the price of the trip. While there are still not very many Chinese citizens who can afford to travel abroad, there is a growing upper middle class which will give rise to more tourists being able to travel outside of China in the near future.

A report published by the European Tour Operators Association (ETOA), commissioned by the UNWTO and the European Tourism Commission (ETC) to study the prospect of China as an outbound tourism market, predicts that Europe could receive at least 5 million Chinese tourists by the year 2020.

These travellers represent an important opportunity for the sector, because of their high level of average spending at their destination and also because they help to smooth seasonal demand, as Chinese holiday periods fall in what is considered to be the low season in many Western countries. Furthermore, this would allow many European destinations to diversify the origin of their tourists and overcome the stagnation of some of their principal tourism markets.

Europe has enormous potential to attract Chinese tourists because they are attracted to the cultural heritage and Europe has a whole array of historical and cultural richness to offer throughout its territory. Moreover, Europe offers other types of tourism such as nature tourism and rural tourism, sport or shopping, which may attract Chinese tourists.

A study carried out by Noya (2008) reveals that seven out the ten countries most highly rated by the Chinese in terms of country brand image are European: France, Germany, the United Kingdom, Switzerland, Italy, Russia and Sweden. This represents an advantage for these European countries. The findings of that study also reveal that the Chinese consider France to be the best wine producer and fashion designer, and identify Italy as the best shoe producer. Consequently, these destinations should take advantage of the image that Chinese tourists have of them. As we have already mentioned, the Chinese are the world's leading consumers of luxury products and their choice of destination when travelling is often motivated by the possibility of purchasing quality products there.

On the other hand, the increase in the number flights between China and certain European countries will help to attract Chinese tourists travelling abroad. Moreover, some Chinese airlines have recently added new routes as part of their strategy of gaining market share. Air China established new flights between China and European and North American cities such as Toronto, Rome, Berlin, Istanbul and Warsaw.

Finally, given the high number of hotel rooms and their quality, Europe is well positioned and has sufficient capacity to accommodate Chinese tourists. Notwithstanding, a series of adaptations would have to be made to these infrastructures in order to compete for the Chinese market more efficiently. But there may only be a limited window of opportunity for European travel agencies and tour operators to adapt, because of the institutional reforms in China. In the new *Regulations on Travel Agencies*, which took effect in 2009, the entry barriers for outbound tour operators were significantly lowered. Before 2009, foreign travel agencies were not permitted to engage in the outbound tourism business, and they only focused on inbound and domestic tourism (Liu, 2008). Now, foreign travel agencies are allowed to operate outbound travel business. Thus, it is expected that foreign travel agencies will have a greater presence in China.

Nevertheless, Europe has some drawbacks that limit the possibility of taking advantage of the Chinese tourism market. One of the reasons for the low number of Chinese tourists visiting Europe could be that the countries of the European Union (EU) received ADS status very late in comparison with other countries. In 2004, the EU signed its first ADS, whereas the first ADS agreements were created in 1997. Therefore, Europe was not one of the possible destination options for Chinese tourists before 2004. In 2010 there were 141 destinations throughout the world with ADS agreements, together with the United States, which has signed an equivalent bilateral agreement with China. The signing of these agreements has given rise to an increase in the competition for clients between national tour operators, with a subsequent reduction in prices in favour of consumers.

The high cost of processing visas and the slowness in obtaining them is another obstacle to increasing the number of Chinese tourists. In some European destinations, the requirements for obtaining a visa are becoming more and more stringent in order to avoid illegal immigration. For countries such as Spain, this situation is aggravated by the scarcity of Spanish consulates (Antón, 2008). Nevertheless, various countries are taking measures in order to lower the visa threshold (CTA, 2011).

Another obstacle for some European countries is the lack of adequate transport connections with China. The geographical, cultural and linguistic distance, together with the poor adaptation of tourism facilities to the peculiarities of Chinese tourists represent other weaknesses. A thorough knowledge of Chinese culture and of the kind of services that Chinese tourists expect to find is essential. The cultural and linguistic distance is an obstacle that reduces the competitiveness of a destination. In Europe, tourism services in airports, hotels, transport services and tourist attractions, are poorly adapted to the Chinese language. Tourist leaflets and information about destinations printed in Chinese are still quite rare. Few guides speak Chinese, and restaurants and hotel services are not adapted to the Chinese diet.

In addition, a common error is to treat Asian tourists in the same way as any other western tourist, and treating all Asian tourists as if they were the same, without differentiating between nationalities.

Table 3 shows some of the differences between European and Chinese citizens.

European citizens	Chinese citizens
Express their feelings	Do not reflect their feelings
Are punctual	Are flexible with the timetable
Form orderly queues	Form multiple queues
Consider it best to start off on the right foot	Consider it best to start off on the left foot
Drink cold water and coffee	Drink hot water and tea
European restaurants are quiet	Chinese restaurants are noisy
Like meat	Like vegetables
Look a person in the eyes when speaking	Look away when speaking
Believe their boss to be of little importance	Believe their boss to be of great importance

Table 3: Some differences between Chinese and European citizens
Source: Adapted from De la Morena (2008)

4. CONCLUSIONS: TAKING ADVANTAGE OF THE POTENTIAL OF OUTBOUND CHINESE TOURISM

In conclusion, the main problems identified from the previous analysis are the air connections between China and some European destinations, the visa process required to travel to Europe, the low level of awareness of many European countries among potential Chinese tourists, and a lack of adaptation of the needs of Chinese tourists. On the other hand, the natural, historic and cultural heritage of Europe and the high level of tourism infrastructures are some of the main strengths for attracting Chinese outbound tourism. In the light of these arguments, we propose some recommendations in order to benefit from Chinese outbound tourism.

Firstly, the connections with some of the main European tourism destinations, such as Spain, should be improved. Europe would increase its chances of securing a significant market share as a direct consequence.

The visa problem is an institutional issue. Visa policies could be improved by relaxing the requirements for obtaining them or enabling the alternative use of passports to avoid passengers being unable to travel because their visas have not yet been processed. These procedures could be accelerated, the duration of visas could be extended to last for a year, new consulates could be opened, and so on.

In terms of promotion, European countries need to undertake more visible and frequent promotions within China (Keating and Kriz, 2008). A more powerful marketing strategy is required to promote Europe, especially for those destinations that are less well-known, including an information campaign about their historical and cultural heritage, in order to improve the image that the Chinese have of Europe. Some European countries should invest in their country brand, so that countries such as Spain can dispel association with stereotypical and obsolete clichés. In spite of the advantages, which have been secured by initiatives based on a rapprochement on an institutional, business and cultural level, there is still a high degree of ignorance in China about many European countries. In this regard, efforts made by governments and tourism institutions should be intensified to facilitate promotion of and collaboration on tourism issues.

Given the increased use of the Internet in China, mostly by the more affluent classes and younger segments of the population, the online presence of the different European countries in the Chinese language should be strengthened.

Moreover, it would be interesting to carry out joint promotional campaigns between different European countries. Promotion in China is difficult for individual countries as the Chinese consider European countries to be provinces within Europe (Bravo, 2008). In other words, Europe is considered to be a destination in itself. Furthermore, as noted above, the Chinese like to visit several countries on the same trip. Therefore, it would be interesting to be able to offer them tours through different parts of Europe.

In terms of adapting the supply to Chinese demands, new tourism products should be developed that would be able to attract more Chinese tourists. The Chinese enjoy visiting museums, but they also enjoy contemplating landscapes and nature. Until now, the attitude of Asian tourists has been passive towards tourism resources (Blanco, 2008). Attempts should be made to ensure that these tourists do not come solely to take photos of the sights but also get involved in the cultures and traditions of the countries that they visit. Different types of tourism should also be offered, such as nature tourism, adventure tourism, gourmet tourism, sport tourism and so on.

The services that make up the tourism product of a destination (hotels, restaurants, transport, travel agencies and leisure venues) should be adapted to Chinese tastes. Signs should be translated, as should menus. The latter might also

include typical Chinese dishes. It is also important to treat Chinese tourists in a different manner from other tourists, even other Asian tourists. In short, Europe should adapt to China, and not vice versa.

In order adapt, companies need trained staff, not only in the language but also in the culture of China (they should know how the Chinese people think, their customs and their needs). One way of bringing Chinese and Western cultures closer together is through exchange programmes between university students or so-called “language tourism”, as this could facilitate greater social, professional and cultural closeness. Therefore, training programmes and exchanges between universities and training centres in China and Europe should be developed further.

All of the above should go hand in hand with greater support from institutions and governments. They should provide more information and resources to tourism companies of European countries, so that the companies may learn the characteristics of the Chinese market.

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Article info: Received 15/06/12. Accepted 20/03/13. Refereed anonymously.

¹ Much of this travel is accounted for by travel to Hong Kong and Macao (Ryan and Huimin, 2009).

² The holiday policy has recently been changed in order to adapt it to the rest of the world. One of the changes is that holidays have been split to avoid the previous situation of a collapse in the transport systems during the so-called "golden weeks" of the holidays, which ultimately dissuaded the Chinese from travelling and forced them to remain at home.